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ABSTRACT

This collection of program evaluation studies is designed to help program evaluation staff in state agencies improve their current program education strategies. It alerts staff members to procedures being used in other state agencies, as well as provides further information about the current status of state rehabilitation agency program evaluation. The materials reviewed consist of the following: (1) input studies which measure and estimate the target population, plan for service delivery, and clarify components of the referral process; (2) process studies which review data systems, case review procedures, factors of manageable caseloads, monitoring techniques, service timeliness, and miscellaneous service delivery components; and (3) outcome studies which present cost and client characteristics, retention of benefits, client satisfaction, reasons for failure, and evaluation of special programs. Indexes are included to facilitate the finding of studies related to a particular area of interest. (Author/HLM)

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MICHIGAN STUDIES IN REHABILITATION

Utilization Series: 1

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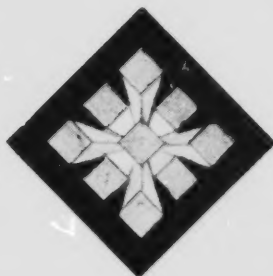
Handbook of Program Evaluation Studies

by

Juliet V. Miller and James F. Wargel

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FOREWORD

The Rehabilitation Research Institute at The University of Michigan (UM-RRI) is involved in several efforts to review and integrate current efforts in state rehabilitation agency program evaluation and to develop new evaluation procedures which are responsive to the need of state agencies to build comprehensive program evaluation strategies. Previous publications have focused on reviewing the current status of program evaluation. A first monograph, Program Evaluation Approaches for State Rehabilitation Agencies: Current Status and Future Directions (Miller, et al., 1977), reviewed the professional literature to identify existing program evaluation models and to suggest further efforts required to increase the utilization of those models in state rehabilitation agencies. A second monograph, A Survey of the Current Status and Program Evaluation Needs in the State-Federal Rehabilitation Program (Crystal, 1978), reviewed the current status and needs in program evaluation based on a review of the state agency Program and Financial Plans (PFP's) to further identify program evaluation needs based on direct input from state agencies.

This Handbook of Program Evaluation Studies is intended to serve a dual purpose. First, it is a tool to help program evaluation staff in state agencies enhance their current program evaluation strategies by alerting them to procedures being used

in other state agencies. Second, it provides further information about the current status of state rehabilitation agency program evaluation which gives a basis for identifying further developmental needs in this area.

UM-RRI wishes to express its appreciation to the many state agencies who cooperated by sharing information about their program evaluation efforts to be included in this handbook. The handbook was developed to respond to the perceived need to facilitate sharing and discussion among state agencies. The fact that, in almost all cases, the state agencies which were contacted were willing to share evaluation procedures and devote time to documenting these procedures indicates the importance of this need. UM-RRI also wishes to thank ICD-RUL for its cooperation in sharing information used to identify studies for this handbook. It is hoped that use of the handbook will result in increased communication among state agency program evaluators which will result in improved program evaluation efforts both within the states and within the total vocational rehabilitation system.

Don K. Harrison, Director
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REVIEW OF STUDIES IN THE HANDBOOK

To better understand the current status of program evaluation and to identify developmental needs, JM-RRI has defined program evaluation as those procedures which provide and encourage the utilization of information to improve decision-making in vocational rehabilitation program planning, monitoring, and revision. This definition leads to an organizational scheme useful in reviewing program evaluation studies which has three broad areas, including: (a) input studies which provide information for use in program planning, (b) process studies which provide information for use in program monitoring, and (c) outcome studies which provide information for use in program revision or change.

INPUT STUDIES

Input studies provide information related to such program planning questions as: How many potential clients are there in the state? Where are they located? What type of disability do they have? What are the service needs of specific disability groups? What are the best plans for delivery of services? What are the average counselor performance standards with specific disability groups? What are the sources for referral to the agency? Within the handbook, studies which address these program planning questions are organized into five broad categories: (a) estimating the vocational rehabilitation target population, (b) measuring the vocational rehabilitation target population, (c) assessing client needs, (d) planning services,

and (e) analyzing the referral process.

Current Trends in Input Studies

A review of the input studies in this handbook indicates the following:

1. Estimating the vocational rehabilitation population.
Several states are using estimating procedures to identify the number, location, and disability type of the potential client population. The procedures being used include the Shea/Worrall method, the U.S. Census Data method, and the National Health Data method.
2. Measuring the vocational rehabilitation target population. Several states have moved from the use of estimating techniques to the use of survey techniques to gain information about the potential VR population in their states. These surveys include both phone and household interview surveys conducted by state agency staff, graduate students, or private survey firms. Such surveys are based on stratified sampling techniques, thus providing a sampling frame which can be used in future studies. Some states are conducting these studies jointly with other state agencies and focusing on functional limitations, rather than set disability categories. The data base developed through these surveys is being analyzed, using a variety of statistical procedures, and is being used for comparison with

actual case data to provide information related to under- and over-served client groups, service to specific disability types, costs, types of services, and outcomes.

3. Assessing client needs. Many states are realizing that data from prevalence studies do not provide comprehensive information about the specific service needs of various disability groups. They are, therefore, using needs assessment procedures designed to more clearly specify the service needs of these groups. These needs assessment studies use a variety of techniques, including interviews, mailed and telephone surveys, data from advocate groups, analysis of intake information, outcome measures administered on a pre-service basis to provide needs information, and teleconferencing with potential clients. These needs assessment techniques move away from gross categories of client types and of rehabilitation outcome goals toward clearer definitions of specific intended outcomes for both individual clients and disability groups. This provides a better understanding of disability groups for general planning and of individual clients for case planning after intake.
4. Planning services. Several states are using information from prevalence and needs assessment studies in combination with existing case information for various planning purposes. A major trend is the use of management-by-objectives (MBO) systems where service goals

are based on prevalence data, actual case data, and effort-cost-outcome data. These procedures set service goals and tolerance levels, and provide feedback to staff on progress toward goals. Simulation models are also being developed which utilize input data and case record data to examine alternate service delivery plans prior to implementation within the agency.

5. Analyzing the referral process. A final group of input studies reflects efforts by state agencies to better understand the referral process, including such information as number of clients referred by various agencies, and amount and accuracy of referral agency staff knowledge about VR services. These studies, in some cases, are combined with outreach programs designed to inform referral sources about VR services.

Developmental Needs Related to Input Studies

To strengthen the existing strategies being used in state vocational rehabilitation agencies to more accurately understand the nature of the potential client population for use in service planning, the following developmental issues need to be addressed:

1. There is a need to compare the accuracy and usefulness of various methods of estimating and actually measuring the potential VR population. This question might be addressed by comparing estimated prevalence rates to measured prevalence rates in those states which have

both types of data available.

2. If measures of the potential VR population within each state do provide more reliable, useful planning data, there is a need to develop methods of measuring the potential population which can be used by several agencies within a state, can be applied in several states, can be conducted at reasonable cost, and can be easily repeated at regular time intervals to provide updated planning information.
3. There is a need to develop more systematic methods of conducting client needs assessment studies. This will require a clearer definition of the intended outcomes of rehabilitation, including indicators and measures of these outcomes, which can be used on a pre-service basis to provide needs data for use in service planning.
4. There is a need to utilize the needs assessment data generated through the use of clearer outcome indicators and measures to refine MBO planning techniques. At present, there is the assumption that all clients within a specific disability type require approximately the same services at the same cost and the same amount of counselor time. More definitive needs assessment techniques may well indicate within disability groups differences which need to be considered in setting service delivery goals. Use of such statistical

techniques as factor analysis and cluster analysis may yield information about new subgroupings of clients which have differing service needs.

5. There is a need to develop goals for outreach to referral sources and measures of the effectiveness of these efforts. Communication to and liaison with referral agencies and with potential client groups is an important agency goal. Outreach efforts could become more systematic if objectives and measures of effectiveness were developed.

PROCESS STUDIES

Process studies provide information related to such program monitoring questions as: What management information system is most effective for a particular agency? What procedures and analyses will be used to monitor cases for compliance to state and federal regulations? How do caseload size and mix of disability type affect the efficiency and effectiveness of service? What are the factors which affect caseload management? How can timeliness of service be insured? How can specific service components best be monitored? Within this handbook, studies which address these broad program monitoring questions are organized into six broad categories: (a) data systems, (b) case review procedures, (c) factors of manageable caseloads, (d) caseload management procedures, (e) measuring timeliness of service, and (f) monitoring of service components.

Current Trends in Process Studies

A review of the process studies in this handbook indicates the following:

1. Data systems. Many state agencies have developed computerized management information systems which generate reports which can be used in monitoring various aspects of rehabilitation services. The most advanced of these systems are real-time, interactive systems with terminals in field offices which allow direct input and output of data.
2. Case review. State agencies have developed standardized case review procedures to assess performance, identify problem areas, and increase accountability. These reviews are conducted by teams working in the field to review a sample of cases for each counselor. At present, these reviews focus on completeness of records and compliance with regulations. Analysis of data from case reviews is usually limited to counts, percentages, and anecdotal comments. In some cases, these data are correlated with data from previous years.
3. Factors of manageable caseloads. A major type of program evaluation study focuses on the relationship between successful rehabilitations and specific characteristics of caseloads such as size, number of severely disabled, and caseload services. The Statistical Package for the Social Sciences (SPSS) is frequently used to analyze these data, using percentages, correlations, and tests

of significance (e.g., t-test or analysis of variance). Information from these studies is used to develop recommendations for caseload size and mix, to help counselors manage their caseloads, and to generate rehabilitation expectancies.

4. Caseload management. Several techniques have been developed which enable the generation of statewide performance profiles for various types of caseloads, using techniques which control for case difficulty, such as weighted case closures. These profiles are, in effect, norms for different types of caseloads which are used by counselors and administrators to compare productivity and costs of individual, office, and district caseloads to state norms.
5. Timeliness of services. Agencies are responding to the need to provide timely services by developing evaluation techniques to study and report on undue delays. The most common approach is to develop averages for length of time in each status which can be compared to specific cases. These comparisons are often reported in "aging reports" which alert counselors to clients who have been in a status longer than the average. Some agencies are conducting studies to identify the extent to which such factors as counselor experience, caseload size, and caseload mix affect timeliness of service.
6. Service components. Several service components have been evaluated by state agencies. Contracted services

from rehabilitation facilities are a major evaluation focus. Two approaches are being used in this area. First, facilities and agencies are working cooperatively to develop specifications for facility evaluation systems which provide data for the dual purpose of internal facility management and external reporting to agencies. Other states are designing evaluation studies which compare client placements (successful rehabilitations) to facility services and costs.

Developmental Needs Related to Process Studies

To strengthen the existing strategies being used in state vocational rehabilitation agencies to accurately monitor the quality and timeliness of rehabilitation services, the following developmental issues need to be addressed:

1. As more sophisticated management information systems are developed, there is an increasing need to train agency personnel at all levels to use data from these systems in making management decisions. This should also include counselors who need to use information about the agency's collective experiences to guide individualized planning with specific clients.
2. A considerable amount of time and cost is now being devoted to case reviews. To maximize the usefulness of these procedures, case reviews need to be expanded to include data about service goals-services-outcomes rather than simply completeness of records and com-

pliance. Such additional information could provide information about service objectives which relate to successful rehabilitation and the comparative impact of specific services on these objectives.

3. The unit of management and evaluation continues to be counselor caseload with type of client and size of caseload compared to productivity and cost. There is a need to move to indicators which more clearly describe outcomes for individual clients, and measures these outcomes on a pre-post basis to indicate productivity. The use of norms for client types is helpful as a broad management tool but gives less specific direction in planning services for individual clients.
4. Timeliness of service is an important goal. However, timeliness of services is currently being evaluated on a normative basis of average time in status. Again, while this provides some general management information, it provides little information about reasons for delay. There is a need to develop techniques for monitoring timeliness of service by comparison to individualized service plans, rather than solely by comparison to normative data about time in statuses.
5. Since rehabilitation purchases service from rehabilitation facilities, a continuing program evaluation need is the integration of agency evaluation data with facility evaluation data. There is a need for continued cooperation between the agency and facilities in the design of evaluation procedures.

OUTCOME STUDIES

Outcome studies provide information related to such program revision questions as: What are the relative costs of successful rehabilitations? What is the number of successful rehabilitations for a given time period? Are rehabilitation benefits retained over time? What are the costs compared to benefits of specific rehabilitation programs? Are clients satisfied with rehabilitation services? What are the reasons for unsuccessful rehabilitations? What impact do special programs have on rehabilitation success? Within this handbook, studies which address these program revision questions are organized into four broad categories: (a) cost and client characteristics evaluated at closure, (b) follow-up of retention and client satisfaction, (c) reasons for failure, and (d) special studies.

Current Trends in Outcome Studies

A review of the outcome studies in this handbook indicates the following:

1. Cost/benefit analysis. Several states are using cost/benefit analysis models to evaluate rehabilitation service outcomes by comparing service costs to both economic and noneconomic benefits to the client, to the client's family, and to society. These models help to more clearly define successful closures in terms of multiple benefits and give important information needed for program decisions.

2. Use of existing data to determine rehabilitation rates.

Many states are using existing case data to determine rehabilitation rates, including the number of successful rehabilitations, percentage of successful rehabilitations for total number served, and percentage of successful rehabilitations for specific disability groups served. These same data are also providing information about the number of unsuccessful rehabilitations. In most cases, these are simple counts and percentages of existing data.

3. Use of existing data to determine quality of placement.

Some states are moving beyond the gross categories of successful and unsuccessful rehabilitation to look at the quality of placement in successful rehabilitations. Case record data are being used as the basis for determining such quality factors as correlation of training with placement and extent to which goals in the individual plan were achieved. At this time, such information is determined by counselor report rather than by actual measurement of outcomes.

4. Follow-up studies to assess retention and satisfaction.

Follow-up studies are being conducted to determine retention of benefits and client satisfaction with services. Some states are also seeking information about need for further vocational rehabilitation services. These studies are usually either phone interviews or mailed questionnaires. The time of follow-up from closure varies from twelve months to five years. In some states

these studies are conducted periodically. Other states are using continuous follow-up procedures where a random sample of clients is automatically contacted twelve months after closure. Some states are correlating follow-up data with other management data to determine the impact of agency performance on client outcome.

5. Evaluation of outcomes in special programs. Because of their limited size and innovative nature, special programs provide a manageable setting for the experimental use of alternate methods of measuring rehabilitation outcomes. Several states are funding special programs which are developing comprehensive rehabilitation objectives for clients, family members, and staff. Achievement of these objectives is measured, using such techniques as standard recording and observation procedures, standardized tests, interviews and goal attainment scaling. While these procedures may not yet be feasible for use with all vocational rehabilitation agency clients, they do provide the opportunity to develop feasible measures which can be used in addition to existing case data.

Developmental Needs Related to Outcome Studies

To strengthen the existing strategies being used in state vocational agencies to evaluate the outcome of rehabilitation services, the following developmental issues need to be addressed:

1. The recognition of the importance of noneconomic benefits in cost/benefit analysis is an important development. There is a need to continue to explore rehabilitation benefits to provide a clearer definition of multiple rehabilitation outcomes.
2. There is a need to standardize measures of rehabilitation retention and client satisfaction. Retention needs to be defined, not only in terms of job retention, but also in terms of retention of nonwork related benefits and in terms of increased career maturity and growth. Client satisfaction measures need to be developed which are more sophisticated than simple questions which ask clients if they like VR services. General job satisfaction measures might also be considered as a way of evaluating the appropriateness of the rehabilitation outcomes.
3. Follow-up procedures need further development to allow use at varying time periods after closure, to facilitate continuous follow-up, and to facilitate correlations between follow-up data and other management data.
4. New measures of successful rehabilitation need to be developed which indicate progress resulting from rehabilitation services rather than simply status at closure. Case difficulty indices are an attempt to consider this. Rehabilitation outcomes need to be measured in terms of progress toward the individualized rehabilitation plan. This will require major efforts in the

development of new measures and indicators which can be utilized to collect data throughout the rehabilitation process as well as at closure.

HOW TO USE THE HANDBOOK

RATIONALE FOR THE HANDBOOK

This handbook is an extension of the UM-RRI review process. Its goal is to identify and catalogue program evaluation studies which have actually been conducted within state VR agencies. One purpose of this handbook is to describe the state-of-the-art of program evaluation at the state level from a perspective of current practice. This description of state agency program evaluation studies can initiate an understanding of day-to-day program evaluation activities at the state level that can supplement the theoretical and state-of-the-art reviews of VR program evaluation material presented in earlier UM-RRI monographs.

A second purpose of this handbook is to help state agency personnel better understand the program evaluation methods and results which are being produced by agency personnel in the other states. After meeting several times with program evaluators from Regions V and VII, it was clear to the UM-RRI staff that evaluators in the various states often felt alone and isolated from colleagues with similar job goals, tasks, and stresses. Therefore, the sharing and pooling of information between state program evaluators was viewed as an important goal.

HOW THE STUDIES WERE SELECTED

The agenda for the meeting of the UM-RRI Advisory Committee in September of 1977 included the task of clarifying with state agency program evaluators the nature of their daily functioning and the types of UM-RRI products which might assist their work. Some of the participants suggested that a more formalized presentation of their activities could be found in the State Plans and Program and Financial Plans (PFP's) from their respective state agencies. It was also suggested that a broader understanding of state level program evaluation activities could be obtained from reviewing the State Plans and PFP's from states not represented at the Advisory Committee meeting.

Following the Advisory Committee meeting, the decision was made by UM-RRI to implement that suggestion. Through the cooperation of the ICD-RUL, copies of the program evaluation section of the FY '74 PFP's for all state agencies were obtained. Complete copies of the FY '78, '79 and '83 State Plans and PFP's for each state were obtained from RSA. Each of these documents for all state agencies (blind, general, and combined) was then reviewed. From this review, a list of state agency program evaluation studies which were either representative of a program evaluation activity directed at meeting the Federal Program Evaluation Standards or which were focused on evaluating VR program components not directly related to the Federal Standards was prepared.

A request for further information about each selected study was then forwarded to the state agency which had reported

the particular program evaluation activity. This request asked for more complete information about the study, the population and sampling procedures used, the data source and instruments employed, the data analysis techniques used, the practical ramifications of the study within the agency, and the availability of materials describing the study. After this, the fuller description of each study was reviewed for its applicability and significance for other state agency program evaluators.

HOW THE HANDBOOK IS ORGANIZED

The studies included in the handbook are arranged in three ways to facilitate handbook use. The studies have been numbered consecutively within the text. These numbers are then cross-referenced in the indexes appearing at the back of the handbook.

The first level of organization divides the studies into these three broad sections: (1) input studies, (2) process studies, and (3) outcome studies. This division has often been used in other presentations of evaluative data. The assignment of the studies to each of the three sections was based on uses of the evaluation information within the agency. For example, a study utilizing the "Service Outcome Measurement Rating Scale," normally conceptualized as an outcome measure, was placed in the input section because it was used to predict client difficulty and to forecast to VR counselors those client factors which are least likely to change without specialized effort.

The second level of organization is subcategories within the input, process, and outcome sections. The input section is divided into these subsections: (1) measuring the target population,

(2) estimating the VR target population, (3) assessing client needs, (4) planning for service delivery, and (5) clarifying components of the referral process.

The process section is divided into these subsections: (1) data systems, (2) case review procedures, (3) factors of manageable caseloads (Federal Standard Five), (4) caseload monitoring techniques, (5) timeliness of service (Federal Standard Three), and (6) miscellaneous service delivery components occurring between acceptance for service and closure.

The output section was particularly difficult to organize for several closely related reasons. First, various methods of data collection (e.g., case review, computer manipulation of case service data, personal interviews conducted over the phone or in person, and questionnaires either mailed or direct interview) are often mixed together in one study. Second, the method of data collection is sometimes applied to very different client populations (disability groups and closure statuses). Third, various outcome measures (rehabilitation gain, client satisfaction, employment status, and cost-benefit, among others) are often measured simultaneously. For example, follow-up questionnaires often contain sections to measure both the retention of benefits and client satisfaction. Finally, there are different times of data collection, particularly in follow-up studies where the time of follow-up varied from two months to two-years after closure.

In an attempt to accomodate all of these dimensions, the output section is divided into these subsections: (1) cost

and client characteristics measured at closure, (2) follow-up studies of retention of benefits (Federal Standard Six) and of client satisfaction with services (Federal Standard Nine), (3) reasons for failure (Federal Standard Eight), and (4) the outcome evaluation of special programs. The first two subsections present output data collected at two different times, i.e., at closure and after closure. The studies in the first subsection (at closure) utilize chiefly case review and the computer manipulation of case service data. The studies in the second subsection (after closure) utilize chiefly questionnaires, either mailed to clients or completed as part of a personal interview. This subsection includes follow-up studies measuring both the retention of benefits and client satisfaction because one questionnaire often included sections to measure both of these dimensions. The third subsection (reasons for failure) is distinct because of its focus on the group of clients closed in statuses 28 and 30. The final subsection focuses on the evaluation of pilot or experimental programs.

Finally, this handbook has three indexes included to facilitate the process of finding studies related to a particular area of interest. First, the index terms assigned to each study are listed as part of the heading of each study in the text. Second, they are presented in two different arrangements in the indexes found in the back of the handbook. Index A lists the studies in the order in which they appear in the handbook and lists the index terms assigned to each, thus showing the commonalities and differences of the studies in each section and sub-

section. Index B lists the index terms in alphabetical order and gives the numbers of the studies to which the term has been assigned, thus identifying studies which are similar. Finally, Index C presents the studies arranged according to the federal region in which they were completed.

USING THE HANDBOOK

This handbook is designed so that a thorough reading of the handbook with particular emphasis on the "Review of Studies in the Handbook" section will provide an overview of the current status of program evaluation as currently practiced in state vocational rehabilitation agencies.

The handbook is also intended to be a reference tool which program evaluators can use to design a variety of program evaluation studies. When using the handbook to gain information needed to design specific evaluation procedures, the following strategies can be used:

1. Identify Specific Subsection of the Handbook. The handbook is organized into a number of subsections. For example, one of the subsections is "Needs Assessment of Client Groups." By reviewing all of the studies in this subsection, one can get an overview of needs assessment techniques and can then contact those agencies which have conducted needs assessment studies of particular interest.
2. Scan Index A: Subject Terms for Each Study. Index A provides a complete listing of all the subject terms assigned to each of the 70 studies in the handbook.

This allows one to quickly review the studies and to identify those studies of greatest interest. Once a narrowed list of studies has been identified by using Index A, one can turn to the more complete description in the handbook and contact the agencies for further information.

3. Use Index B: Subject Index. Index B is an alphabetical listing of subject terms with numbers of the studies assigned to each of the terms. By using this index, one can quickly identify all of the studies in the handbook which are related to a particular interest area. For example, under the subject term "clients: severely disabled" are listed ten studies involving the severely disabled. One could then read the description of these ten studies and contact the agencies for further information.

Use of these various search strategies can help one quickly identify those studies in the handbook of greatest interest.

INPUT STUDIES

Measuring the Potential VR Population	#1 - 8
Estimating the Potential VR Population	#9 -11
Needs Assessment of Client Groups	#12-18
Planning Systems	#19-24
Referral Process	#25-27

MEASURING THE POTENTIAL VR POPULATION

01

THE ASSESSMENT OF DISABILITY IN MINNESOTA

Contact: Han Chin Liu
Department of Vocational Rehabilitation
3rd Floor Space Center
444 Lafayette Road
St. Paul, MN 55101
(612) 296-9138

Report: An agency report is available.

Index: Prevalence, Household interview, Questionnaire,
Stratified sample, Computerized analysis

Description:

The basic objective of this study was to develop reliable estimates of the prevalence of various disabled groups as identified by functional limitation, to investigate the unmet needs, and to determine the effectiveness of services being provided for the disabled in Minnesota. Disability is defined as a limitation of capacity or inability to perform activities normally carried out by persons in like circumstances. Data were collected through household surveys. A multi-stage area probability sampling procedure was used for selecting households to be interviewed. The interviewing started in May, 1976, and was completed in September, 1976. The study population was defined as all housing units within the state of Minnesota, exclusive of those on military

01 (continued)

reservations. The sample fraction used was about 1/500. A questionnaire was designed to solicit data on family background, problems in receiving medical care, health problems and functional disability problems, medical status pertaining to the disabled individuals, and employment status of the disabled. Data were all stored on computer tapes. Various statistical methods will be used for the analysis, such as descriptive statistics and correlational analysis. Both statewide estimates and sample statistics are to be analyzed.

02

VOCATIONAL DISABILITY IN MICHIGAN BECAUSE OF HEALTH CONDITION

Contact: Robert D. Struthers
Coordinator of Program Evaluation
Vocational Rehabilitation Bureau
Michigan Department of Education
P.O. Box 30010
Lansing, MI 48909
(517) 373-3970

Report: An agency report is available.

Index: Prevalence, Descriptive statistics, Home interview,
Questionnaire

Description:

This survey was commissioned by VR to Market Opinion Research of Detroit to confirm previous estimates of the total number of disabled in Michigan, to determine the number who were severely disabled according to federal definition, and to obtain more detailed information about the need for rehabilitation services. The survey population represented 7.7% of the total non-institutionalized population of Michigan. Geographically distributed households were approached and questions asked to identify persons between the ages of 16 and 64 who were limited in the kind and the amount of work they could do. Those persons who had been so limited for six months or longer were given a thirty minute interview. Cross tabulations of questionnaire responses were reported to show all characteristics for a variety of sub-populations within the total disabled population. The study not only provided information about sub-groups of the total population, but also described the types of services requested.

03

A FOLLOW-UP OF A SURVEY OF THE HANDICAPPED IN MICHIGAN

Contact: Robert D. Struthers
Coordinator of Program Evaluation
Vocational Rehabilitation Bureau
Michigan Department of Education
P.O. Box 30010
Lansing, MI 48909
(517) 373-3970

Report: An agency report is available.

Index: Prevalence, Follow-up, Phone interview

Description:

In 1975, Market Opinion Research of Detroit was commissioned by Michigan Bureau of Rehabilitation to conduct a telephone household survey to obtain more detailed information about the number and type of potential VR clients. Subjects interviewed in depth had been limited for six months or longer in the kind or amount of work they might do. The number of subjects interviewed was 917, of which 377 asked for more information about VR and of which 373 gave addresses where they might be reached. The research group urged these subjects to initiate contact with local VR offices. The addresses and names of these subjects interested in VR services were given to VR counselors. The counselors were asked to contact the interested subjects. Of the 373 addresses given for subjects, 353 were found to be accurate, and 248 persons (or 70%) were actually located and interviewed. The interview questionnaire consisted of queries about demographic information (sex, age, race, primary disability) about the person's experience in contacting VR since the initial survey and about the work status

03 (continued)

of the respondents (type, length of employment, and weekly earnings). At the end of each questionnaire, the interviewer was also asked to estimate for each subject the rehabilitation potential, the potential for acceptance by VR for service, and the availability of the client for VR services. The information obtained in response to the questions above was tabulated in frequencies and percentages and was used to generate estimates concerning the impact of available and/or eligible clients on the agency's previous estimates of need for services.

04
OHIO PREVALENCE STUDY

Contact: John H. Agnew
Program Evaluation
Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229
(614) 466-4954

Report: An agency report is available.

Index: Prevalence, Telephone interview, Stratified sample

Description:

A random sample telephone survey was conducted during the summer of 1975. The survey was designed to determine the incidence of disabled individuals and prevalence of disability types by county. The population sampled included all Ohio households but excluded institutionalized individuals. A structured interview questionnaire was designed for the study. Statistical sampling procedures were used to identify phone numbers. Data are stored in the computer system and have been analyzed using the SPSS computer program package. The results of this prevalence study have been used to more accurately identify incidence/prevalence information and to guide budgeting, manpower allocation, outreach, public information, and long range planning.

05

NORMING REPORT TO GENERATE PERFORMANCE STANDARDS

Contact: Wilma T. Fountroy
Administrative Assistant for Program Evaluation
Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229
(614) 466-8787

Report: An agency report is available.

Index: Prevalence, Underserved populations, Census data,
Service data

Description:

This norming procedure was used to analyze the characteristics of rehabilitated clients by demographic and disability types with each bureau (Bureau of Vocational Rehabilitation and Bureau of Services for the Blind) to determine underserved disability groups and other underserved disability population groups. The analysis was done using data on rehabilitated clients of the Ohio BVR/BSB for FY '75. The underserved determination was made by comparing statistically sampled groups from the Management Information system with U.S. Census data on disabled populations. The results of the study were used to promote the development of target group populations to be served by the bureaus in FY '76.

06

ANALYSIS OF INDICATORS OF NEED FOR VR SERVICES

Contact: Arthur Pawlowski
New York State Department of Education
Office of Vocational Rehabilitation
99 Washington Avenue
Albany, New York 12230
(518) 474-3946

Report: Not available but will discuss with other states.

Index: Demographics, Prevalence, Service data, Underserved population

Description:

To present a general picture of the intensity of vocational rehabilitation services provided statewide, a report was prepared, ranking each county of the state by (a) percent of population served, (b) net encumbrances per capita for case service, (c) net encumbrances per client served for case service, and (d) composite ranking based on the three preceding rankings. The population included all clients served by the New York State Office of Vocational Rehabilitation during FY '76 from applicant status through case closure. The data used included case status information and county of client origin retrieved from computer records based on the Case Service Report System (RSA-300). Case service costs were based on encumbrances for case service during FY '76. Rank order comparisons were made for each of the three factors, and the composite ranking was used to identify counties in the highest and lowest quartile. The results of this study are being used to examine the relationship between availability of facilities, services, and manpower.

07

CRITERIA FOR SEVERELY DISABLED CLIENTS

Contact: Arthur Pawlowski
New York State Department of Rehabilitation
Office of Vocational Rehabilitation
99 Washington Avenue
Albany, NY 12230
(518) 474-3946

Report: Not available but will discuss with other states.

Index: Prevalence, Underserved population, Service records,
Severely disabled

Description:

A review was made of the program steps used in the New York State Office of Vocational Rehabilitation's data processing system to identify the severely disabled. After comparison of each element with the contents of RSA Manual Section 3005.03, recommendations were made to modify the program steps. The new criteria was then applied to all clients served from applicants status through case closure. RSA Manual Section 3005.03 and New York State Office of Vocational Rehabilitation data processing records as of July, 1976, were used as data sources. A direct comparison of client counts by each disability code was made, based on the existing data processing steps, and modifications were proposed after element-by-element review of RSA Manual Section 3005.03. Parallel counts of severely disabled clients were presented State Agency management staff and were used to prepare and issue revised instructions to field staff on coding the severely disabled for data processing records.

08

REVIEW OF INSUBSTANTIALLY HANDICAPPING CONDITIONS

Contact: Paul Bowerman, Supervisor
Rehabilitative Services
DISRS
P.O. Box 25352
Oklahoma City, OK 73125

Report: Not available but will discuss with other states.

Index: Prevalence, Overserved population, Service data

Description:

An analysis of Oklahoma's rehabilitated clients who were insubstantially handicapped according to the Office of Human Development in FY '75 was made, using information about clients in active and closed status during FY '74, '75, and '76. Summary data giving numbers and percents were prepared using computer (R-300) data on the insubstantially handicapped group. Information was disseminated to administrators, coordinators, supervisors and counselors to help them in analyzing their caseload and in planning modifications as indicated by the data.

ESTIMATING THE POTENTIAL VR POPULATION

09

ESTIMATE OF NON-INSTITUTIONALIZED DISABLED AND SEVERELY
DISABLED PERSONS WHO CAN BENEFIT FROM VR SERVICES IN OKLAHOMA
BY COUNSELOR AREA, COUNTY, AND MAJOR CITIES

Contact: Paul Bowerman, Supervisor
Rehabilitative Services
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Estimating target population, Shea-Worrall method

Description:

Estimates were made by utilizing the method originally developed by Susan Shea Ridge, 1973, and revised by John D. Worrall, 1975. The number of non-institutionalized disabled and severely disabled population between the ages of 18-64 was estimated by county, city, and counselor areas. Information is being used for planning and for analyzing the impact of VR services on target groups. Shea's published work is titled: "Estimating Need for Rehabilitation Services," and Worrall's work is titled: "Methodologies for the Estimation of the Vocational Rehabilitation Target Population: An Exploratory Analysis." Information about both studies is obtainable from the Arkansas Rehabilitation Research and Training Center, University of Arkansas, West Avenue Annex, 346 N. West Avenue, Fayetteville, Arkansas, 72701.

10
WYOMING PREVALENCE STUDY

Contact: Tom Oligschlaeger
320 Hathaway Building
Cheyenne, Wyoming
(307) 777-7385

Report: An agency report is available.

Index: Estimating target population, Census data

Description:

In 1974, an attempt was made to identify the number of people in Wyoming with specific types of disabilities. Due to resource limitations, the study involved a review of the literature to find prevalence rates. These rates were then applied to the 1970 census data for Wyoming. Estimates of disability for the entire state were made. The information is being used for planning and public information. Also, numerous requests from planners and other public and private sector agencies have been received.

11

STUDIES OF LIMITATION OF ACTIVITY DUE TO CHRONIC CONDITIONS

Contact: Paul Bowerman, Supervisor
Statewide Planning
DISRS, RS #24
P.O.Box 25352
Oklahoma City, Oklahoma 73125

Report: Agency report is available,

Index: Estimating target population, National health data

Description:

The National Center for Health Statistics provides estimates of the number and percent of individuals with selected disabilities, by limitation of activity due to selected chronic conditions. The methodology includes four basic categories of activity limitation: (a) no activity limitation, (b) with limitation, but not in major activity, (c) with limitation in amount or kind of major activity, and (d) unable to carry on major activity. Major activity is defined as the ability to work, keep house, or engage in school or preschool activities. Oklahoma modified the methodology and applied it to the state's total population and to each of the four geographically based coordinator areas. The population included the non-institutionalized disabled and severely disabled population between the ages of 17-64 by selected chronic condition and by degree of activity limitation. Data were analyzed by disability group for both the total state population and by coordinator areas. All 27 disabling categories coincide sufficiently with the eligibility requirements for VR clients to be useful in estimating the prevalence of disablement by selected chronic condition.

NEEDS ASSESSMENT OF CLIENT GROUPS

12

NEEDS ASSESSMENT PLAN FOR THE HANDICAPPED

Contact: Paul Bowerman, Supervisor
Statewide Planning
DISRS, RS #24
P.O.Box 25352
Oklahoma City, Oklahoma 73125

Report: Agency report is available.

Index: Needs assessment, Questionnaire, Intake, Client
assessment

Description:

Oklahoma uses a procedure for identifying the needs of handicapped clients as perceived by the client and counselor during the diagnostic phase of services. A questionnaire has been developed which is completed by the client initially and then reviewed with the counselor at acceptance. The questionnaire was piloted with 240 VR referred clients and with 100 sheltered workshop clients. It is estimated that it can be used with approximately 12,500 clients per year. The data can be used in planning services and also analyzed for client groups to yield numbers and percentages in various need categories.

13

CLIENT ASSISTANCE PROJECT

Contact: Arthur Pawlowski
New York State Education Department
Office of Vocational Rehabilitation
99 Washington Avenue
Albany, NY 12230
(518) 474-3946

Report: Agency report is available.

Index: Needs assessment, Client assessment, Advocacy

Description:

The New York State Office of Vocational Rehabilitation through its contractor, the Urban League of Onondaga County, Inc., operated a three year project to inform and advise all OVR clients and client-applicants of all benefits available under the Rehabilitation Act of 1973 as amended, as well as to assist these individuals in completing rehabilitation services. Project efforts were directed toward identifying impediments to the receipt of services, identifying the needs for client services, and providing liaison assistance between client-applicants and OVR applicants or other sources of rehabilitation services in the community. Annual reports summarize the project findings. The project served all OVR applicants and clients as well as other handicapped individuals in need of rehabilitation services who reside in Onondaga County. Client interview protocols and requests for assistance, surveys of OVR staff, and telephone and mail surveys of recent applicants for vocational rehabilitation services were used to collect data during the project. Statistical summaries were prepared and narrative reports summarize and highlight the most frequent

13 (continued)

concerns of applicants and the experiences of staff with client assistance. Project reports have sensitized the OVR staff to client assistance needs and, combined with quarterly conferences between OVR and Urban League staff, have provided the base from which plans have been made for a fourth year project to disseminate the experience gained in client assistance statewide.

14

SERVICE OUTCOME MEASUREMENT OF REHABILITATION SERVICES

Contact: Ann King, Supervisor
Rehabilitative Services #24
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: Several monographs are available which provide complete information.

Index: Needs assessment, Case difficulty, Service outcome measurement, Pre/post measure, Actuarial tables

Description:

The Service Outcome Measurement (SOM) is a client rating method in 13 areas of functioning measured at acceptance and at closure. The factors are combined at acceptance with other demographic data about the client along with recent agency experience with similar clients to produce a measure of client difficulty and to forecast for counselors those factors which are least likely to change without specialized effort. The SOM is used with all clients accepted for VR service. Data from the SOM is computer processed to provide comparisons of specific clients to other similar clients who have been served previously. The agency has developed monographs which thoroughly describe the uses of the SOM. The SOM is used to alert a counselor to his/her most difficult cases, based on agency success or failure with similar clients.

15

SEVERELY HANDICAPPED SERVICES

Contact: Mario G. Barillas
507 Tenth Street
Des Moines, Iowa 50309
(515) 281-4142

Report: Agency report is available.

Index: Needs assessment, Group interviews, Severely disabled

Description:

This study was conducted to survey severely disabled individuals in Iowa to determine their perceptions of problems connected with their employability and of needs for rehabilitation services. Only persons with the most severely handicapping conditions were included in this survey. The population included primarily those individuals who had been served by the Iowa Easter Seal Society, supplemented by other sources to include representation in each of the 99 counties of the state. Twenty-six counselor-interviewers personally interviewed 650 disabled individuals. A structured interview format was used with each item constructed so that the interviewer could check from a variety of response options. The survey instrument was designed to be machine scorable. Responses for each of the items were tabulated and reported in simple frequencies and percents. Copies of the report have been circulated to all offices of the state agency and have been used in staff conferences. Data can be used in planning and resource allocation.

16

SEVERELY HANDICAPPED SERVICE

Contact: Arthur Pawlowski
New York State Education Department
Office of Vocational Rehabilitation
99 Washington Avenue
Albany, NY 12230
(518) 474-3946

Report: Agency report is available.

Index: Needs assessment of groups, Service data, Severely disabled, Neuromuscular disease

Description:

This project is supported under section 130 of the Rehabilitation Act of 1973, as amended. The project purpose is to develop a model neuromuscular disease rehabilitation service delivery program and to contribute to a data base from which service needs and related costs for this population can be estimated to guide future policy making. Residential and transportation needs as well as assistive devices are among the factors being addressed in the preparation of very severely disabled individuals for entry into rehabilitation programs or, where this is not feasible, in programs to improve the individuals' ability to live independently or function normally within their families and communities. Approximately 70 individuals from the New York City area with neuromuscular handicaps so severe as to be beyond the benefit range of the regular state vocational rehabilitation program are being served by the project. In addition to data prescribed by the Case Service Report System (RSA-300), the Urban Institute, as the federal contractor to coordinate these projects, has devised a data retrieval protocol to

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assess client capacity and needs. Identification of unmet client and community resource needs will lead to recommendations for program changes to better serve the most severely handicapped.

17

TELECOMMUNICATION AS TECHNIQUE FOR CONCERNED CITIZEN INVOLVEMENT

Contact: Paul Bowerman, Supervisor
Rehabilitative Services #24
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: Agency report and grant (#12-p-5799/6-01) report available.

Index: Needs assessment of groups, Modified delphi technique, Telecommunications, Consumer involvement

Description:

The Oklahoma teleconference network links 110 hospitals in Oklahoma, western Kansas, and northern Texas via a closed-circuit television system. This system was utilized to link 120 potential consumer service recipients and service providers at 15 different sites for a series of shared quarterly tele-conferences. The groups at each site were able to simultaneously receive information from the VR agency staff and to give and receive reports from each other concerning topics identified and researched between teleconferences by each site team. Topics of concern were then clarified and presented together in a research utilization seminar.

18

ESTABLISHMENT OF RVS COORDINATORS AND SUPERVISORS

Contact: Paul Bowerman, Supervisor
Rehabilitative Services
DISRS
P.O.Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Needs assessment, Service priorities, Planning

Description:

During 1966, the division of planning placed a major emphasis on receiving input from all professional staff (area coordinators, RVS supervisors, RVS counselors, RVS evaluators, staff psychologists, rehabilitation teachers, and vending stand officers) regarding innovation to improve total functioning. Counselors, evaluators, staff psychologists and teachers offered recommendations consolidated for their respective groups. In 1971, the area coordinators and supervisors had assisted in developing 50 planning priorities, and they were now requested to review those priorities and to explain which of them had been implemented in their areas, to state which priorities they still wished to implement, and to rank the significance of the priorities from 1-20. This information has been summarized by rank order, by percent of those viewing priority as important, and by narrative form.

PLANNING SYSTEMS

19

ANALYSIS OF DISABILITY TYPE PER CASELOAD

Contact: Robert W. Gibson,
Specialist for Operational Management Systems
Division of Vocational Rehabilitation Services
P.O. Box 26053
Raleigh, NC 27611
(919) 733-5766

Report: An agency report is available.

Index: Planning system, Performance standards, Counselor goals

Description:

In 1971, the North Carolina Division of Vocational Rehabilitation Services adopted an Operational Management System (OMS) based on concepts included in Management by Objectives and Program Planning and Budgeting. The OMS adopted in 1971 has been the primary case service management tool since that time. It has undergone revisions and updates but it remains essentially the same as it was in 1971. Annually, counselors and first line supervisors formulate goals for each caseload, taking into consideration program and financial resources available to each caseload. Program goals are monitored monthly, and there is a quarterly summary of program accomplishments as related to established OMS goals. OMS goals are always subject to renegotiation during the year if circumstances warrant, such as diminished resources, a counselor

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change, or loss of client population occurs. Measures of central tendency and variance within caseloads in each program type are determined to assist supervisors and counselors in establishing reasonable OMS goals. These mean and standard deviations provide counselors and their supervisors with guidelines concerning agency expectations. All clients and all caseloads of the North Carolina Division of Vocational Rehabilitation Services are included in the system. Computerized OMS summary sheets which provide descriptive statistics are produced. The system is used to assist caseload planning and to establish services and closure objectives.

20

EFFECTIVENESS/EFFICIENCY MEASURES FOR AGENCY PROGRAMS

Contact: Darlene Taylor
603 State Office Building
47 Trinity Avenue
Atlanta, Georgia 30334
(404) 656-2610

Report: Copies of measures are available.
Contact person will discuss with other states.

Index: Planning systems, Performance measures, Performance expectations

Description:

Performance measures are required by the State Office of Planning and Budget for each budget function. Each measure is catalogued and contains the purpose of the measure, definitions, sources of data, upward and downward influences, and cross references to other measures. At the beginning of each fiscal year, the agency sets forth the annual performance expectation and a tolerance range for each measure. Deviations outside the tolerance range must be explained in a narrative report. Reports on the measures are required quarterly. The system reports the relationship of actual to expected in various performance areas and ranges of tolerance for each area. The system is used to report performance to agency staff, the department, and the State Planning and Budget Office.

21

SERVICE PLANNING AND MANAGEMENT SYSTEM

Contact: Deborah McKenna
Program Development Unit
Illinois Division of Vocational Rehabilitation
Box 1587
Springfield, Illinois 62707
(217) 782-2722

Report: Publication site obtainable from contact person.

Index: Planning system, Service data, Multiple regression

Description:

This report reflects the exploration of the meaning of service data from the last five years through the statistical procedures of analysis of variance, correlation, and multiple regression. The initial chapter describes the context of the agency planning process. The second component describes the relationship between caseload variables and fiscal measurements. The third and final portion proposes a new planning system oriented toward increasing the accuracy of program planning and toward producing a methodology for program monitoring.

22

COUNSELOR/CLIENT COMPUTER SIMULATION MODEL

Contact: Han Chin Liu
Department of Vocational Rehabilitation
3rd Floor Space Center
444 Lafayette Road
St. Paul, Minnesota 55101
(612) 296-9138

Report: Report is available from agency.

Index: Planning system, Simulation, Staffing patterns,
Service data

Description:

The purpose of this study was to develop a counselor/client model, using computer simulation techniques to better understand the interface between DVR staff and its clients. By using this model, the impact of management decisions on the service provided to its clients can be determined and thus provide DVR with a technique for staffing pattern analysis. The study was performed by Kenneth L. Rich from July 1, 1975, to December 30, 1975, on a contract basis. The components used in this simulation model are the individual clients and the rehabilitation statuses. Variables including both the exogenous and endogenous types were selected for this analysis from DVR's existing Case Service Report File. A simulation computer program, DVRSIMI (which contains about 700 statements), was used for the analysis. The program modules include referral, priority, allocation, status determination, client requirements, closures, and insufficient resources. The model is to be used for analyzing staffing patterns within DVR and is considered as an experimental tool for management research staff for generating and testing hypotheses.

23

EVALUATION OF SPINAL CORD INJURED GROUP

Contact: Ralph E. Vennum
1309 Winewood Boulevard
Tallahassee, Florida 32301
(904) 488-5331

Report: An agency report is available.

Index: Planning systems, Severely disabled, Spinal cord injured, coordination of agencies

Description:

In 1976, the Florida legislature mandated the development of a comprehensive plan for coordinating the programs of hospitals and various agencies for the treatment and rehabilitation of persons severely disabled by spinal cord injury. The resulting plan incorporates all phases of care (organization, training, coordination, referral, cost, evaluation) and relies heavily on existing resources (hospitals, emergency transportation, acute care facilities, rehabilitation centers, and half-way houses). It is the product of an assigned task force and includes a review of mortality, morbidity, and prevalence rates for various types of spinal cord injury.

24

DEPARTMENT PLANNING FOR PROGRAM EVALUATION

Contact: Jane Douglas
Coordinator of Evaluation Services
Rehabilitation Division
505 East King Street
5th Floor
Carson City, Nevada 89710

Report: Agency reports available.

Index: Planning systems, Evaluation procedures

Description:

This compilation of program evaluation guides is a packet of forms and procedural outlines for doing program evaluation. It includes a description of the general evaluation procedure for special projects (I&E, outreach office, cooperative state agency projects), for external grant proposals, and for current client verifications. Client service delivery systems are measured by numerical summaries of the total number of clients served, total accepted, total completing program, total continuing program, total terminating program, total severely disabled, and total at various educational levels. Special projects are reviewed by reviewing stated goals, objectives, in-house evaluation criteria, project costs by functions, client success (employment satisfaction), administrative function, training projects, community impact, and other features. Client verification procedures are described as a result of ten-minute interviews with five active cases per district office.

REFERRAL PROCESS

25

STUDY OF INTAKE REFERRALS OVER FULL INTAKE CYCLE

Contact: Joseph Farrell, Supervisor
Program Planning & Evaluation
40 Fountain Street
Providence, Rhode Island 02903
(401) 421-7005, extension 259

Report: An agency report is available.

Index: Referral

Description:

This report contains frequencies and percentages of the total referrals separated by city or town of residence, by source of referral, and by reported disability. It represents a tabulation into these groupings of all (n=199) intake cases begun between November 1, 1976, and December 31, 1976. There was much variability among counselors on the number of referrals in each of the categories established.

26

REFERRAL SOURCE ANALYSIS

Contact: Paul Bowerman
Supervisor
Rehabilitative Services #24
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: Agency report is available.

Index: Referral, Percentage

Description:

Oklahoma conducted an analysis of the percent of clients referred by each referral source reported by Rehabilitation Services, Visual Services, statewide totals, coordinator areas, and supervisory areas. This analysis was based on all cases during FY '72, '73, '74, and '75 and used data from the computerized management information system. Numbers and percents of clients referred by various referral sources were reported. The information was sent to administrators, coordinators, supervisors, and counselors for use in management and in communication with referral agencies.

27

STUDY OF KNOWLEDGE OF VR REFERRAL SOURCES

Contact: Tom Oligschlaeger
Vocational Rehabilitation
320 Hathaway Building
Cheyenne, Wyo. 82002
(307) 777-7385

Report: Not available but agency will discuss study.

Index: Referral, Physicians, Questionnaire

Description:

In an attempt to generate more referrals from Wyoming physicians, a mailed questionnaire was sent to all registered physicians. Of those responding, most had some knowledge of Vocational Rehabilitation, but 77% felt they needed more information. The questionnaires, which included the physician's name and address, were then sent to vocational rehabilitation counselors in the area so they could make further contact. Since the purpose of the study was to encourage outreach, very little data analysis was done. The results of this study were used to develop outreach activities to increase referrals from physicians.

PROCESS STUDIES

Management Information Systems	#28
Case Review Procedures	#29-32
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Caseload Management	#37-40
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Monitoring Service Components	#44-47

MANAGEMENT INFORMATION SYSTEMS

28

INTEGRATED CLIENT DATA SYSTEM

Contact: Carl Rennewitz
MS OB -31C
Olympia, WA 98504
(206) 753-0784

Report: Not available but agency will discuss.

Index: Data system, Monitoring, Case flow.

Description:

The Integrated Client Data System is a computer-based system, solely related to state-federal VR clients. Authorizations for purchase of client services are produced from the computer on demand by VR field counselors using interactive terminals. Client statistical data is updated on line (real time processing). Case service documents comprise the input, and data analysis is based on case flow and case documents. Basic management information reports are produced, estimating year end results based on managers' schedule of performance plans. Both statistical and financial data are brought together on monthly production/analysis reports for all levels of management by special target groups as well as levels of organization hierarchy (i.e., counselor, supervisor, district administrator, state director). Estimated cost/month in production is \$14,500 (data entry, computer, terminal and line costs, output maintenance) of which \$9,500 are personnel costs. The system contains complete data on

28 (continued)

all state-federal VR clients and currently contains a three-year history base. Data includes applications, authorizations/billings, IWRP, ongoing changes to individual client data bases, closure documents, follow-up results, and supervisory reviews of client records. Data analysis includes listings, comparison of actual versus planned performance, and algorithms to estimate year-end results from year-to-date based on any manager's plan for the year (MBO concept). Current use of the system includes day-to-day management of caseloads and monitoring annual performance (including client movement, results, dollar expenditures). Future use will be a more formal program evaluation using target-group analyses, matching target group service delivery models to actual results and services (resources).

CASE REVIEW PROCEDURES

29

FORMALIZED CASE EVALUATION PROGRAM

Contact: Harry W. Guise
Administrator Evaluation Section
Bureau of Vocational Rehabilitation
1318 Labor and Industry Bldg.
Seventh & Forster Sts.
Harrisburg, Pa. 17120
(717) 787-7312

Report: An agency report is available.

Index: Case review

Description:

This material is the guide for conducting case evaluation within the Pennsylvania state system. It begins with a clarification of the meaning and intent of case evaluation and then proceeds to outline various ways in which the procedure can be used at different organizational levels.

Case review sheets are also enclosed. The intended result of these activities is stated to be to obtain improved casework quality through training and reinforcement.

30

CONTINUOUS FIELD OFFICE CASE REVIEW

Contact: Carl Bryngelson
State of Minnesota
Division of Vocational Rehabilitation
3rd Floor Space Center
444 Lafayette Road
St. Paul, Minnesota 55101
(612) 296-5645

Report: An agency report is available.

Index: Case review, Case quality

Description:

The Continuous Field Office Case Reviews are conducted in field offices throughout the state. The review procedure is designed to assess agency performance, identify problem areas, and increase accountability. The review covers the total process of providing rehabilitation services but does not include any financial auditing. A team representing each geographic area conducts a review on approximately 120 cases. The main areas covered in the review are case notes, medical records, eligibility, vocational diagnosis and plan, service provision, and closures. The population includes all cases opened or closed within the last 12 months. About 8% of the cases are randomly selected for the study. Tabulation of frequency count and computed percentages are provided. The case review results are used to assess agency performance, identify problem areas, and increase accountability.

31

OPERATIONS REVIEW

Contact: Harold Payne, Director
300 S. Capitol
Lansing, Michigan 48909
(517) 373-2062

Gary Gaeth
Regional Supervisor
Kent County Dept. of
Social Service
415 Franklin S.E.
Grand Rapids, MI 49507
(616)247-6323

Report: An agency report is available.

Index: Case review, Case quality

Description:

This material describes the procedures for an annual case review of case records to determine qualitative and quantitative measures of client progress. A random sample of 50 percent of cases for each counselor district is reviewed, along with all cases in statuses 20 and 22 and a random 30 percent selection of the most recent monthly flow sheet. All cases are reviewed for 14 factors, including referral information, diagnostic information, eligibility certification, IWRP, and case supervision. Regional supervisors submit a written plan detailing problems to be solved, staff to be involved, and a timetable for change. They also meet with the director concerning the results of the case review process.

32

IN-HOUSE PROGRAM ADMINISTRATION REVIEW

Contact: Jane Douglas
Coordinator of Evaluation Services
Nevada Rehabilitation Division
505 East King Street
Carson City, Nevada 89710

Report: An agency report is available.

Index: Case review

Description:

This report describes an application of the Federal Program Administrative Review recommendations within one state agency setting. Once federal guidelines were evaluated for usefulness to state programs and procedures, supervisors and an administrative panel were trained in the procedure, and a pilot review was completed to establish baseline reliability data. Then actual case reviews were conducted by supervisors and the panel from a sample stratified by district, case status, and counselor. The results of this process were analyzed by computer to prepare an evaluation report with correlative data for FY '77. The report also offered pragmatic procedural recommendations for case service and a design for continued maintenance.

CHARACTERISTICS OF MANAGEABLE CASELOADS

33

CASELOAD SIZE VERSUS PRODUCTIVITY OF REHABILITATIONS

Contact: Wilma T. Fountroy
Administrative Assistant for Program Evaluation
Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229

Report: An agency report is available.

Index: Caseload characteristics, Caseload size, Case
management

Description:

This study was conducted to find if there is a relationship between the size of a caseload and the productivity or number of rehabilitations a counselor might be able to achieve.

The FY '74 through '76 Ohio Bureau of Vocational Rehabilitation/Bureau of Services for the Blind caseloads (50 clients or more in size) were used to examine factors affecting the number of rehabilitated clients attained per caseload.

Quarterly caseload statistical data analysis via the Statistical Package for the Social Sciences (SPSS) was conducted.

Cases were sampled, using statistical sampling techniques from the SPSS and cross correlations were used to identify the relationship between caseload size and productivity.

Results of the study are being used to guide case management and monitoring.

34

REHABILITATION SUCCESS RATE IN RELATION TO THE PERCENTAGE
OF SEVERELY DISABLED CLIENTS IN THE CASELOAD AND IN RELATION
TO CASELOAD SIZE

Contact: Joseph A. Farrell, Supervisor
Program Planning & Evaluation
40 Fountain Street
Providence, Rhode Island 02903
(401) 421-7005 ext. 259

Report: An agency report is available.

Index: Caseload characteristics, Caseload mix, Caseload
size, Severely disabled

Description:

This study was an attempt to assess the hypothesis that counselors with a lower number of 26 closures may have a higher number of severely disabled clients who are harder to process and who take more time to serve. Ten counselors with the highest number of 26 closures and ten counselors with the lowest number of 26 closures were selected. These two groups of counselors were compared on the average percentage of severely disabled clients in the caseload and in the average size (number of cases) of the caseload. The results suggest that the null hypothesis is accepted when SSI and SSDI counselors are eliminated from consideration but rejected when these two types of counselors are included. Caseload size did not differ significantly between the groups.

35

PROGRAM EVALUATION CASE MOVEMENT MODEL

Contact: Wilma T. Fountroy
Administrative Assistant for Program Evaluation
Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229
(614) 466-8787

Report: An agency report is available.

Index: Caseload characteristics, Caseload size, Caseload
distribution, Case movement

Description:

This study determined the normal and upper/lower levels of performance relative to caseload size, caseload distribution, case processes, and numbers accepted as applicants and eligible clients. The FY '74 through '77 VR client population caseload statistics formed the data base for the study. These data were analyzed for types of disability group. The data are being used to assess declining caseload size and to aid in future planning.

36

CASELOAD MOVEMENT AND ITS EFFECT ON PRODUCTIVITY

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Administrative Assistant for Program Evaluation
Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229
(614) 466-8787

Report: An agency report is available.

Index: Caseload characteristics, Caseload movement

Description:

A study was designed to determine the appropriate intake and processing necessary to maintain an even and continual flow of acceptable productivity over an extended period of time. The procedure used was to analyze those caseloads having good productivity. The data were grouped into different levels of rehabilitation productivity to analyze how caseload practices vary and influence the number of rehabilitations. The FY '76 caseload statistics of the Ohio Bureau of Vocational Rehabilitation and the Bureau of Services for the Blind were used as a data source for the study. Special computer programs from the Statistical Package for the Social Sciences (SPSS) were used to produce formula flow charts and cross-correlations. The data were used for planning and case management and can be used to generate counselor caseload rehabilitation expectancies.

CASELOAD MANAGEMENT37
CASELOAD MANAGEMENT PROFILE

Contact: Duane T. Sermon
Department of Vocational Rehabilitation
444 Lafayette Road
St. Paul, Minnesota 55101
(612) 296-5634

Report: An agency report is available.

Index: Caseload management, Caseload monitoring, Service data

Description:

The Caseload Management Profile (CLM) system is a computer based system which measures 94 statistical indicators of counselor caseload performance. The CLM profile shows the individual counselor's performance, the average performance of counselors in the agency, and the variance from group performance on each variable measured. From analysis of the correlation procedure, those variables that are most closely related to each other and significantly related to the three criterion variables are also printed in profile form. The CLM provides not only group and individual data but shows this data in pictorial form. Thus, the counselor and supervisor have a visual description of the counselor's caseload and its relative position in relation to the group performance of all other counselors in the agency. The data source is client statistical data from case service reports

37 (Continued)

plus data from the Caseload Management Profile instrument. A multiple linear stepwise regression technique is used to develop a prediction of the number of closures the caseload should produce. The profile is used by counselors and counseling supervisors to analyze their caseloads, investigate problems, and set goals for caseload management.

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STATEWIDE CASE DIFFICULTY INDEX

Contact: Lynn Little
Specialist for Data Analysis
or
Jean E. Kirkman
Program Evaluation Specialist
Division of Vocational Rehabilitation Services
P.O.Box 26053
Raleigh, NC 27611
(919) 733-5920

Report: An agency report is available.

Index: Caseload management, Caseload monitoring, Case difficulty, Service data

Description:

The Statewide Case Difficulty Index is based on methodology developed by Duane Sermon, Minnesota DVR, in 1971. The Case Difficulty Index is an experience based description of case difficulty according to disability type. North Carolina DVR began computing the Case Difficulty Index four or five years ago simply to monitor accomplishments in serving difficult cases. The Index has shown an increase each year since computations were started. In FY '76 and '77 an average weighted closure index and a total weighted closure index was computed for each caseload, in addition to the Case Difficulty Index. The Index is computed for all North Carolina DVR closures. This analysis uses client data from the R-300 and uses descriptive statistics to determine case difficulty. Results are used to monitor caseloads with regard to case difficulty and quantity of production.

39

PROFILE ANALYSIS TECHNIQUE

Contact: Lynn Little, Specialist for Data Analysis (919) 733-5920
Bob. H. Philbeck, Deputy Director (919) 733-5766
Joe Morrow, Chief Evaluation and Audit (919) 733-5920
Division of Vocational Rehabilitation
P.O.Box 26053
Raleigh, NC 27611

Report: An agency report is available.

Index: Caseload management, Case difficulty, Service data

Description:

The Profile Analysis Technique (PAT) is a system of program analysis developed by West Virginia Regional Rehabilitation Research and Training Center. The procedure allows the comparison of one caseload with all agency caseloads or all similar caseloads. It also allows comparison of offices within the agency. The comparisons that are made are multi-dimensional with numerous criteria plotted on a single graph. PAT is being used with all cases of the North Carolina DVR. Data used in the PAT include monthly caseload summaries, client master lists, and case service expenditure records. Data analysis includes the use of descriptive statistics presented in graphs. Quarterly PAT reports are currently being provided to counselors and field administrators. Counselors and their first line supervisors are asked to analyze the performance of each caseload as it compares with all other similar caseloads in the state. This comparative assessment allows the counselor and supervisor to assess the caseloads' strengths and weaknesses and make decisions about particular aspects of performance that need to be changed in order to make the caseload more favorable comparable with similar caseloads.

40

CASE MOVEMENT MONITORING SYSTEM

Contact: Kuniiji Sagara, Administrator
P.O.Box 339
Honolulu, HI 96809
(808) 548-4769

Report: No report available, but agency will discuss.

Index: Caseload management, Case movement.

Description:

This material describes a new application of the Status Movement Index originated by the Arizona State VR Agency in which the movement from any status to the other possible statuses is assigned a particular weight. A Status Movement Index total can then be calculated for the cases reported monthly per counselor, district office, or state agency. This clarifies individual counselor's caseload management, the supervision quality, and the state-wide monitoring process.

STUDY OF UNDUE DELAYS

41

STUDY OF CLIENTS IN SAME STATUS FOR EXTENDED PERIOD OF TIME

Contact: Roberta Pisa
 Department of Vocational Rehabilitation
 3rd Floor Space Center
 444 Lafayette Road
 St. Paul, Minnesota 55101
 (612) 296-1718

Report: An agency report is available.

Index: Timeliness, Case review

Description:

A number of clients were identified as having remained in the same status (excluding training status 18) for over two years. The names of these clients were sent to counselors to review and determine whether or not the case should be closed, moved to a new status, or continued in the status. Sixty-nine percent of the cases were moved or closed as a result of the study. This process will be completed again, using clients in status over one year, and, ultimately, standards will be set for each status. All open cases in a given status are used in the review. Status of cases reviewed are compared to the status of existing cases in the same status. Baseline data and figures for average time-in-status for each status are developed for use in analyzing current cases. This time-in-status information will be used to identify cases before delays become excessive, so that clients can move through the system as quickly as possible, thus increasing accountability.

42

REVIEW OF 02 STATUS CASES

Contact: Sandra Drabik
Room 1005
Labor and Industry Building
John Fitch Plaza
Trenton, New Jersey 08625

Report: An agency report is available.

Index: Timeliness, Referral, Case review

Description:

This study was conducted in response to a concern about the number of cases in referred status (02) for inordinate lengths of time. The goal of the study was to determine whether there were valid reasons for the delay or whether there were some counselor performance problems which interfere with service delivery. Four DVRS local offices were selected for the review. The offices were chosen to represent various areas of the state. Fifty percent of all the cases in status 02 over ninety days were selected randomly. Since time did not permit the review team (three people) to read all of the cases, a maximum of 20 cases per counselor were reviewed. The sample was selected from caseload printouts from the month preceding the review. A structured case review survey instrument was developed for the study. Analysis was made to see if severely disabled clients were reflected in the sample in the same proportion as in the total statewide caseload. Other factors such as counselor experience, general vs. special caseload, ten week prevocational evaluations, and disability type were analyzed to determine their impact on the 02 status. The results were disseminated to local offices.

43

STATUS 10 REVIEW CONCERNED WITH DELAYED MOVEMENT TO
STATUS 10 AND ELIGIBILITY LIMITATIONS OF DISABILITY

Contact: Harry W. Guise
Administrator, Evaluation Section
Bureau of Vocational Rehabilitation
1316 Labor & Industry Bldg.
7th & Forster Streets
Harrisburg, PA 17120
(717) 787-7312

Report: An agency report is available.

Index: Timeliness, Eligibility determination, Case review

Description:

This study attempts to study reasons for delayed movement to status 10 and for difficulties in eligibility determination, and to measure improvement of district and regional offices between a first and second review process. The entire population of active status 10 cases was reviewed, utilizing specific case review sheets and the results tabulated by computer into percentages and frequency data.

MONITORING SERVICE COMPONENTS

44

REVIEW OF IWRP RECORDS

Contact: Sandra Drabik
Room 1005
Labor & Industry Building
John Fitch Plaza
Trenton, New Jersey 08625

Report: Report is available from agency.

Index: Case quality, IWRP, Case review, Questionnaire

Description:

The study was conducted in eight local vocational rehabilitation offices, two in each of New Jersey's four districts. The purpose of the study was to assess how the IWRP system was functioning with respect to the new regulations and the recent revisions in case recording. Two hundred and seventy two (272) case records were reviewed by the evaluation team and questionnaires were mailed to those clients reviewed. Five case records were selected for each counselor in each office for those clients who entered extended evaluation or plan status between May 1, 1976, and November 1, 1976. Three of the five cases chosen by the counselor were reviewed by the unit. Descriptive statistics were used to analyze the data. Individual conclusions and recommendations were drawn for each office and in some cases for specific counselors. Once all of the office reviews were completed, the total data were analyzed and statewide recommendations were made.

45

VENDOR EVALUATION SYSTEM

Contact: Robert D. Struthers
Coordinator of Program Evaluation
Bureau of Vocational Rehabilitation
Michigan Department of Education
P.O.Box 30010
Lansing, MI 48909
(517) 373-3970

Report: An agency report is available for each vendor evaluated.

Index: Vendors, Interview, Training appropriations,
Cost

Description:

Description narratives about various vendors in the state have been prepared, using a common outline. The vendors selected are either chosen at random or on the basis of a specific request from a VR counselor. Data are collected through face-to-face interviews with the vendor agency's administrators, with clients, and with employers, regarding the graduates of the vendor programs. Information is presented concerning the main services offered by the vendor, ancillary services available, method of determining attendance, the ratio of practice to theory in the program, the ratio of students to teachers in each class, special compensations for VR services, the refund schedule, the probationary schedules, and the satisfaction with the program of clients and of the employers of clients. A comparison of the services offered and the costs per program is also prepared to aid counselors in making judgments concerning the use of certain vendors and concerning the legitimacy of client complaints about specific vendor services.

46

PRIVATE TRAINING FACILITIES

Contact: Ann King, RS#24
Supervisor Rehabilitative Services
DISRS
P.O.Box 25352
Oklahoma City, Oklahoma 73125

Report: Report is available from agency.

Index: Vendors, Training appropriations, Cost

Description:

This study analyzed the number of rehabilitated clients who had received training at private business or vocational schools. Data on occupations related to training, home-makers, severity of disability, earnings, cost of tuition, and cost of all services were used in the study. Information on all status 26 closures for FY '75 and '76 (1076 clients) formed the basis for the study. Results were presented in numbers and percentages. The results of the study have been disseminated to administrators, coordinators, and counselors to help in planning facilities' utilization for training of clients.

47

TRAINING OF CORRECTIONAL CLIENTS IN A MODERATE SECURITY PRISON

Contact: Ann King, RS#24
Supervisor, Rehabilitative Services
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Completion rate, Recidivism rate, Case service data,
Correctional clients

Description:

An effort was made to determine success rates and recidivism rate of clients receiving rehabilitation services of training in vocational/technical occupations prior to release from prison. Some general trends could be implied from the study, but a number of unanswered questions still remain. The training setting at the Stringtown facility is unique within the state, and there is no other similar facility which compares to it. The population includes rehabilitation clients in training at the prison facility (893). Data included prison records, rehabilitation training records, and computer data (R-300) on each client. Numbers and percentages were used for data analysis. The results were disseminated to administrators, coordinators, counselors, and instructors within the agency.

OUTCOME STUDIES

Client Characteristics and Cost Measured at Closure	#48-54
Follow-up of Retention and Satisfaction with Services	#55-65
Reasons for Failure	#66-67
Special Programs	#68-70

CLIENT CHARACTERISTICS AND COST MEASURED AT CLOSURE

48

PROGRAM DATA ANALYSIS FOR 1971-1974

Contact: Ann King, Supervisor
Rehabilitative Services #24
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Cost, Earnings, Timeliness, Service data, All
clients, All closures

Description:

This study presents a variety of information on re-arranged formats about 47,846 clients closed in statuses 08, 26, 28, and 30 for four fiscal years. Chart 1 presents all closures by closure status, by year, by number of cases per disability, and by average time on caseload (referral to closure). Chart 2 presents the overall average time on caseload for all four closure groups for the four-year period. Chart 3 presents a ranking of all closures by disability for time on caseload. Chart 4 describes disability categories by number of cases, rank of 26 closure rate, and percent by closure status. Chart 5 summarizes disability categories according to average monthly earnings, average monthly taxes, average cost of services, average number of months needed to pay back cost of services in taxes, and number of cases per disability.

48 (continued)

Chart 6 describes all status 26 closures by disability, by occupation at closure (D.O.T. code), by cost of services and by weekly earnings.

49

STUDY OF ALCOHOLIC CLIENTS IN THE TULSA AREA

Contact: Ann King, RS#24
Rehabilitative Services
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Cost, Client characteristics, Reason for closure,
Timeliness, Service data, Alcoholics, All closures

Description:

This was a demographic study of alcoholics in the Tulsa, Oklahoma, area giving the number and percent in each status, source of referral, age, sex, marital status, number of dependents, source of support, work status, weekly earnings, educational level, race, average time of services, reason for closure, cost, and percent receiving each service. There were 491 clients identified in all statuses during the time period of July 1, 1975, to March 1, 1977. Computerized R-300 data provided the data base for the study. Numbers and percentages were used for data analysis. Results were disseminated to administrators, coordinators, and counselors.

50

QUALITY ASSESSMENT OF HOMEMAKERS

Contact: Wilma T. Fountroy
Administrative Assistant for Program Evaluation
Ohio Rehabilitation Services Commission
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Columbus, Ohio 43229
(614) 466-8787

Report: An agency report is available.

Index: Client characteristics, Services provided, Service data, Case review, Homemakers, 26-closures

Description:

This study assessed the agency's homemaker program in terms of the services provided to rehabilitated clients closed as homemakers and of the characteristics of those clients closed as homemakers. The population included FY '75 through '77 rehabilitated clients closed as homemakers. Data from special computer runs to analyze percentages of selected characteristics were combined with case review information to provide the data base for the study. Computerized statistical sampling techniques were used to draw the sample. The results were used within the agency for program assessment with subsequent policy revisions and also were used as planning information for the revision of closure 26 follow-up program relative to homemakers.

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COST/BENEFIT ANALYSIS

Contact: John F. Schlichting
Chief of Planning & Research
Alaska Division of Vocational Rehabilitation
Pouch F State Office Building
Juneau, Alaska 99811
(907) 586-6500

Report: An agency report is available.

Index: Cost-benefit, Service data, All clients, All closures

Description:

This study examined the economic return on the monies spent rehabilitating VR clients in Alaska during FY '73 through '76. The technique used in the examination was cost/benefit analysis, using a model designed by the staff of the Alaska DVR, based on the work done by R. W. Conley. Included in the report are assumptions upon which the analysis is based and conclusions about the economic impact of Alaska's VR program together with the mathematical formulation of the model used in the analysis. Data used in the analysis include VR clients closed during FY '73 through '76. Sources of data were the R-300 and R-2 reports. The results are being used for program evaluation and modification.

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COST/BENEFIT ANALYSIS

Contact: Carl Rennowitz
MS OB-31C
Olympia, WA 98504
(206) 753-0784

Report: No report is available but agency will discuss.

Index: Cost-benefit, Cost-effectiveness, Payback period,
Service data, Severely disabled, 26-closures

Description:

This project was performed in 1972 under contract with Berkeley Planning Associates. An attempt was made to identify serverely disabled clients in the study and judge effectiveness of programs and costs to that population. Analyses of benefit/cost, cost/effectiveness and taxpayer payback periods were attempted. The population included clients rehabilitated in the state of Washington during FY '72. Data included expenditures and client data from the R-300. Data analysis included the technique described by Ronald W. Conley, "A benefit-cost analysis of the VR program," Journal of Human Resources, IV, Spring, 1969. Also, means, standard deviations and multivariate regression analysis were used. The data were used in further modeling for benefit/cost and payback reporting to consumers and legislature, for program evaluation, and for program modification.

53

OCCUPATIONS OF DEAF AND HEARING IMPAIRED WHO WERE REHABILITATED
DURING THE PERIOD OF JULY, 1973- 'PTEMBER, 1976

Contact: Ann King, Supervisor
Rehabilitative Services #24
DISRS
P.O. Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Occupations at closure, Case service data,
Deaf and hearing impaired clients, 26 closures

Description:

This study analyzed the occupations of Oklahoma deaf and hearing impaired clients closed in status 26 during the study time period. The population included 698 clients. R-300 data formed the data base for the study. Data were presented in tables giving numbers and percents. Results were disseminated to administrators, coordinators, supervisors, counselors, and consumer organizations for the deaf.

54

APPROPRIATENESS OF TRAINING FOR 26 STATUS CLOSURES

Contact: Darlene Taylor
603 State Office Building
47 Trinity Avenue
Atlanta, Georgia 30334
(404) 656-2610

Report: An agency report is available.

Index: Occupation at closure, Training appropriateness,
Case review, Trained clients, 26 closures

Description:

This study reviewed a random sample of 26 closures who had been provided training to determine if the training they received was related to their occupation at closure. This was done to respond to the Federal Standards for Program Evaluation, Standard #2, Data Element (vi). The population included training cases closed at status 26. Case reviews were conducted to determine the type of training provided, occupation at closure, and to analyze whether the two were related. Descriptive statistics were used with the total number of clients who received training and were closed in a job related to the training. These were expressed as a percentage of the total number who received training. The results are being used to report on requirements for the Federal Standards and to give an indication of effectiveness of training.

FOLLOW-UP OF RETENTION AND SATISFACTION WITH SERVICES

55

FOLLOW-UP 26 RETENTION

Contact: Diana Triplett
Room 720
1 West Wilson Street
Madison, Wisconsin 53702
(608) 266-0930

Report: An agency report is available.

Index: Retention, Satisfaction, Work appropriateness,
Mail questionnaire, All clients, 26-closures

Description:

This follow-up study utilized a mail questionnaire to survey successful rehabilitation closures one year after closure. The questionnaire contained items to record employment status, employment stability, client's perception of VR service, and the agreement between the client's work plan and his/her present work. Former clients contacted were closed in FY '75. It was expected that the majority of respondents would not remember or would report little agreement between the plan and their work, since these clients were closed prior to the introduction of the Individual Written Rehabilitation Program (IWRP). Sixty-five percent of those to whom the questionnaire was mailed returned a completed questionnaire.

56

CONTINUOUS FOLLOW-UP PROCEDURE

Contact: Han Chin Liu
Department of Vocational Rehabilitation
3rd Floor Space Center
444 Lafayette Road
St. Paul, Minnesota 55101
(612) 296-9138

Report: An agency report is available.

Index: Retention, Satisfaction, Post-closure service,
Mailed questionnaire, Client interview, All clients,
All closures

Description:

The Minnesota Client Follow-up Study has been conducted continuously since February, 1977. The study is designed to determine the vocational status of former clients whose cases were closed 12 months previously. In addition, clients' attitude toward their employment, their satisfaction with vocational rehabilitation services, and their further need for services are also examined. Both a mailed questionnaire and a personal interview schedule are designed for data collection. The population of this study includes all status 26, 28, and 30 closures closed 12 months previously. A 15 percent random sample is used. Clients' case information is obtained from the existing Case Service Report File stored in the computer-based management information system. Statistical methods used for the analysis include descriptive statistics, contingency tables and related measures of association, and correlational analysis. The data will be used to measure total agency performance and the effectiveness of current service programs, thus providing management with information for future planning.

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FOLLOW-UP STUDY FOR STANDARDS 6 and 9

Contact: Ann King RS#24
Supervisor Rehabilitative Services
DISPS
P.O.Box 25352
Oklahoma City, Oklahoma 73125

Report: An agency report is available.

Index: Retention, Satisfaction, Mail questionnaire,
All clients, All closures

Description:

The follow-up study utilized a mail questionnaire to survey clients from all disability groups and from all closure statuses from FY '76. The questionnaire elicited data concerning employment status and earnings and contained eight questions (yes-no) about client satisfaction with VR services. A sample of 495 clients was selected by computer to receive the mailed questionnaire. Of these clients, 48% could not be located and 277 responded to the questions. The data was summarized by presenting the frequency and the percentage of respondents answering each question.

58

CLIENT FOLLOW-UP SURVEY

Contact: James Sharp
Rehabilitation Resource & Development Section
Indiana Rehabilitation Services
17 West Market Street
Indianapolis, Indiana 46204
(317) 633-5961

Report: An agency report is available.

Index: Retention, Satisfaction with placement, Mail and
phone questionnaire, All clients, All closures

Description:

In addition to the items mandated in the Federal Program Evaluation Standards, this Indiana survey includes questions concerning the adequacy of service provision in the area of job placement. Data obtained from several different types of items indicate that a substantial percentage of the respondents felt that they had needed more help in job placement. There was also some indication that the former clients would have preferred more contact with their counselors than actually occurred. The population included clients closed as rehabilitated (status 26) and not rehabilitated (status 28 or 30) during FY '76. A follow-up survey questionnaire was developed and administered by mail or by telephone interview. Data analysis included reporting of average and median earnings and other relative frequencies, and comparisons to former year data with adjustment of average earnings for inflation. Two reports were developed: one which reports major findings and one which reports results for various client sub-groups. The report was distributed widely and was presented in staff meetings of agency managers for use in program decision making.

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FOLLOW-UP STUDY OF STATUS 26, 28, and 30 CLOSURES

Contact: Paul M. Heidebrecht,
Program Evaluator
Kansas Services for the Blind and Visually Handicapped
2700 West 6th
Topeka, Kansas 66606
(913) 296-4454

Report: The agency will share information.

Index: Retention, Satisfaction, Personal interview,
Visually impaired, All closures

Description:

A specially designed questionnaire was used for this study. It included items to record employment status and client satisfaction with VR services. The interviews of clients were conducted by social workers of the department which had been designated to serve the visually handicapped population within their respective jurisdictions. The initial sample was larger than the completed sample because interviewers were unable to locate some clients because of the death of some clients and because some clients did not wish to participate. However, 40% of the FY '75 closures were eventually interviewed. The change in rehabilitant status between closure and follow-up found in the sample population was then used to project figures for such status change within the total population. The agency itself raises some question about the validity of the findings due to the smallness (140-150 yearly 26 closures) of the total agency caseload size.

60

REHABILITATION GAINS BY CLIENTS IN SELF-EMPLOYMENT

Contact: Carol J. Whitcraft, Ph.D.
Director Research & Statistics (512)447-0106
or
George C. Hamm
Research Statistician (512)447-0216
Texas Rehabilitation Commission
118 East Riverside Drive
Austin, Texas 78704

Report: An agency report is available.

Index: Retention, Business success, Mail questionnaire
(client and counselor), Self-employed clients,
26 closures

Description:

This study examined information about clients closed in self-employed status using demographic characteristics of the sample, counselor responses related to client gains or failures in business during their contact with the client, and the client's own perception of his/her business success or failure. A sample of 168 cases closed during a 12-month period beginning June, 1974, and ending May, 1975, in self-employed work statuses were used for the study. Data sources included computerized client records, client responses to mailed questionnaires, and counselor responses to mailed questionnaires. The Statistical Package for Social Sciences (SPSS) was used to analyze the data. Results were used to provide administrators data on program effectiveness by measuring client successful gains in their own businesses.

61
CLIENT SATISFACTION

Contact: Mario G. Barillas
507 Tenth Street
Des Moines, Iowa 50309
(515) 281-4142

Report: An agency report is available.

Index: Satisfaction, Mail questionnaire, All clients,
26 closures

Description:

A mailed follow-up questionnaire was sent to approximately 1800 clients who had been closed rehabilitated during FY '69 through '71. The sample was stratified for sex, age, major disabling condition, office of closure, and period of year during which closed. The follow-up interval ranged from a minimum of 17 months after closure to a maximum of 55 months after closure. This population was studied using a stratified sample of clients rehabilitated during a three-year period. Data analysis included frequency tabulations of responses and percentages. Copies of the report have been circulated to staff and have been the basis for a supervisory-staff conference during which the results and implications were discussed.

62

HOMEBOUND SEVERELY DISABLED

Contact: Mario G. Barillas
507 Tenth Street
Des Moines, Iowa 50309
(515) 281-4142

Report: An agency report is available.

Index: Satisfaction, Client interview, Homebound clients,
All closures

Description:

From a recently completed study entitled, "A Survey of the Severely Disabled in Iowa," it was possible to separate the respondents who had been agency clients and that sub-population of clients who had been considered homebound. These two additional sorts were the basis for re-analyzing the data from the original survey. The population included the 386 individuals who had formerly been clients and with that group the 269 individuals who were homebound clients. A personal interview using a structured interview instrument with a check list format was used for the study. Data analysis consisted of tabulations by frequency and percents for each of the questionnaire items. Copies of this re-analysis were circulated to professional staff in each office for use in future planning.

63

FOLLOW-UP OF SEVERELY DISABLED

Contact: (Ms.) Mirdza Kains
Nebraska Department of Education
Division of Rehabilitation Services
301 Centennial Mall South, Sixth Floor
Lincoln, NE 68509
(402) 471-2961

Report: An agency report is available.

Index: Satisfaction, Phone questionnaire, Severely disabled clients, All closures

Description:

The follow-up study consisted of a telephone interview conducted with 200 former Nebraska DVR clients. These persons were closed in statuses 26, 28, and 30 during FY '77.

This study was designed to assess client satisfaction with various aspects of the rehabilitation process. A random sample was chosen of clients across the state. The sample consisted of 100 status 26 closures and 50 each of status 28 and 30 closures. A questionnaire based on Standard Nine of the Federal Evaluation Standards was developed and administered by trained telephone interviewers. The responses will be tabulated and comparisons will be made between the six Nebraska regions. Uses in the agency will be determined in the future.

64

SEVERELY DISABLED QUADRIPLAGIC CLIENTS AND VOCATIONAL
REHABILITATION OUTCOMES

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Director Research and Statistics (512) 447-0106
George C. Hamm
Research Statistician (512) 447-0216
Texas Rehabilitation Commission
118 East Riverside Drive
Austin, Texas 78704

Report: An agency report is available.

Index: Satisfaction, Client characteristics, Cost,
Mail questionnaire; Service data, Severely disabled
clients, All closures

Description:

The study describes client and cost characteristics of rehabilitated and non-rehabilitated spinal cord injured quadriplegics. The population included 84 cases closed during FY '74 and '75. Computerized client records and client survey responses from mailed questionnaires formed the data base for the study. The Statistical Package for Social Sciences (SPSS) and Burroughs Reporter System were used to analyze the data. The results will be used to provide program administrators with results of services to the severely disabled quadriplegic sub-population.

65

AVAILABILITY AND EFFICIENCY OF REHABILITATION SERVICES FOR
DEAF/HARD OF HEARING CLIENTS

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Director Research & Statistics (512) 447-0106
George C. Hamm,
Research Statistician (512) 447-0216
Texas Rehabilitation Commission
118 E. Riverside Drive
Austin, Texas 78704

Report: No report available but agency will discuss study.

Index: Satisfaction, Mail questionnaire, Deaf and hearing
impaired clients, All closures

Description:

This study identified services and programs which were particularly beneficial to deaf and hard of hearing individuals in Texas. The study included an assessment of clients' responses regarding their perception of the quality of services they received. The population included clients from FY '74 (2387 clients) and from FY '75 (2967 clients). Computerized client records and client responses to mailed questionnaires provided data for the study. Data were analyzed using the Statistical Package for Social Sciences (SPSS). The results were used to provide program administrators with results of services to hearing impaired clients served by the Texas Rehabilitation Commission during the two year period.

REASONS FOR FAILURE

66

ANALYSIS OF INELIGIBLE CLIENTS

Contact: Arthur Pawlowski
 New York State Education Department
 Office of Vocational Rehabilitation
 99 Washington Avenue
 Albany, New York 12230
 (518) 474-3946

Report: An agency report is available.

Index: Reason for closure, Client characteristics,
 Services provided, Post-closure services,
 Case series data, Case review, All clients,
 28-30 closures

Description:

A two-part presentation of the New York agency experience with non-rehabilitated closures in statuses 28 and 30 was made.

Part I presents statistical data in graphic and tabular form, indicating growth in non-rehabilitated closures from FY '73 through '76 and shifts in composition of these closures by reason for closure, type of disability, association with the agency's mental hygiene sub-program and distribution by geographic location. Part II reports on a review of a sample of case records for clients closed not rehabilitated during FY '76. Statistical data were presented for all closures in status 28 or 30 for the study time period. Also, a stratified cluster sample of 75 cases closed not-rehabilitated in the four most frequently utilized reasons for closure groups was selected from

66 (continued)

one local office. Statistical data were obtained from computerized records based on the R-300 and on case record reviews, and information was recorded by research staff on reasons for closure, services provided, client status prior to closure, post-closure client contacts, and previous closure. Data analysis included comparisons over time of the distribution of selected client characteristics and non-rehabilitated clients. Case record reviews which summarized in narrative form the counselor-client contacts and the reasons for case closure were also used. The reports were presented to management staff and were reviewed in relation to agency procedures for case recording, case review, and provision of placement services.

67

FOLLOW-UP OF 28 and 30 CLOSURES: REASONS FOR FAILURE

Contact: Wilma T. Fountroy
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Ohio Rehabilitation Services Commission
4656 Heaton Road
Columbus, Ohio 43229
(614) 466-8787

Report: An agency report is available.

Index: Reason for failure, Mail questionnaire, All clients,
28-30 closures

Description:

This procedure is an annual follow-up program of all clients closed in status 28 or 30 for the previous year. It is also designed to incorporate IWRP annual review of clients closed as ineligible. The data collection includes a questionnaire which is mailed from the central office, followed by individual contact initiated by the field case review analyst. Statistical sampling and data analyses are completed via computer. The results are used to provide information about client needs, effectiveness of the VR program and to provide direction for future planning.

SPECIAL PROGRAMS

68

EVALUATION OF DEMONSTRATION PROJECT TO SERVE INDIVIDUALS MOST SEVERELY HANDICAPPED

Contact: Jack Landro
250 E. 500 South
Salt Lake City, Utah 84111
(801) 533-5991

Report: No report available, but agency will share information.

Index: Service delivery feasibility, Client interview,
Staff interviews, Severely disabled clients,
All closures

Description:

This project serves severely handicapped individuals using the rehabilitation service delivery model which does not require a vocational goal for eligibility for services. The population includes 180 severely disabled clients. Clinical interviews with clients, staff, and service agencies provide the data base for the study. The results of the study will be used to determine the feasibility of this approach to service delivery to the severely disabled.

69

METHODS OF IMPROVING REHABILITATION SERVICES TO THE SPINAL
CORD INJURED SEVERELY HANDICAPPED

Contact: Jack B. Schmitt
Research Director
Roosevelt-Warm Springs Rehabilitation Center
Warm Springs, GA 31830

Report: An agency report is available.

Index: Acceptance of client, Achievement tracking scales,
Case service data, Client interviews, Severely
disabled, Spinal cord injured, All closures

Description:

The goals of this project are: (a) to develop an effective model of family and community acceptance and involvement with the spinal cord injured (SCI) and (b) to evaluate the effectiveness of the model in helping SCI patients reach maximum rehabilitation potential and independence. This project's population is limited to State of Georgia spinal cord injured persons who are admitted to Roosevelt-Warm Springs Rehabilitation Center. Scales are being designed to track the patient's and family's achievement on a multitude of rehabilitation objectives. These scales are based on data sources such as standard recording and observations, standardized tests, and interviews. Patients are equally assigned on a random basis to experimental and control groups. All scales are designed for computer analysis. A variety of standard sampling statistics will be used, depending on technical characteristics of different data items. Results will be used to improve service to the spinal cord injured and their families--especially after hospital follow-up care.

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PUBLIC OFFENDERS PROGRAM: PROGRAM REVIEW TECHNIQUE

Contact: Deborah Jones McKenna
Program Development Unit
Illinois Division of Vocational Rehabilitation
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Springfield, Illinois 62706
(217) 782-2722

Report: An agency report is available.

Index: Clients served, Services provided, Cost, Case
service data, Case review, Staff interviews,
Correctional clients, All closures

Description:

Four special programs were evaluated separately: the Vocational Alternatives Program (a program for youthful offenders operated by a rehabilitation facility); the Vocational Academic, and Social Training Program (VAST) and four forestry camps (youthful offender programs operated jointly by IDVR and the Juvenile Division of the Department of Corrections); the Chicago Federal Offenders Project (a federally funded project which served federal offenders referred to IDVR by the U.S. Probation and Parole Office in Chicago); and the Chicago Public Offender Program (an attempt to coordinate the activities of all the IDVR counselors in Chicago who worked exclusively with ex-offenders, both juveniles and adults). The "success" of each project was measured against its goals and objectives, and the operational problems of each program were analyzed. Each evaluation report offered recommendations for the future of the individual project it discussed. A final "position paper" summarized common themes and problems and raised general issues regarding the agency's

service to ex-offenders. The population included disabled ex-offenders, both juveniles and adults, who were clients of Illinois DVR. Information was drawn from interviews with persons involved in the operation of the various projects, computerized data provided by the agency management information system, and various contracts and other documents affecting project operation. Sample individual case files were also reviewed for some projects. The evaluation reports were primarily descriptive program reviews. Some comparisons were made among the projects with regard to numbers of clients served, types of services, and costs. The recommendations in each of the program evaluation and the position paper were circulated among all those persons interviewed in preparation of the reports. Several reports were amended according to the comments and corrections that were suggested. Final decisions about recommendations were made by the agency director.

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- #1: Prevalence, Household interview, Questionnaire, Stratified sample, Computer analysis
- #2: Prevalence, Descriptive statistics, Household interview, Questionnaire
- #3: Prevalence, Follow-up, Phone interview
- #4: Prevalence, Telephone interview, Stratified sample
- #5: Prevalence, Underserved clients, Case service data, Census data
- #6: Prevalence, Underserved clients, Case service data, Client characteristics
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- #10: Estimating, Census data
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- #13: Need assessment, Client assessment, Advocacy
- #14: Need assessment, Case difficulty, Service outcome measurement, Pre-post measure, Actuarial tables

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- #17: Need assessment, Modified Delphi technique, Telecommunications, Consumer involvement
- #18: Need assessment, Service priorities, Planning

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- #20: Planning system, Performance measures, Performance expectations
- #21: Planning system, Case service data, Multiple regression
- #22: Planning system, Simulation, Staffing pattern, Service data
- #23: Planning system, Coordination, Severely disabled, Spinal cord injured
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- #26: Referral, Percentages
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- #49: Cost, Client characteristics, Timeliness, Reason for closure, Service data, Alcoholics, All closures
- #50: Client characteristics, Services provided, Service data, Case review, Homemaker closures, 26 closures
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- #52: Cost-benefit, Cost-effectiveness, Payback period, Service data, Severely disabled, 26 closures
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- #54: Occupation at closure, Training appropriateness, Case review, Trained clients, 26 closures

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- #56: Retention, Satisfaction, Post-closure services, Mail questionnaire, Personal interview, All clients, All closures
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